

Creating a Bid from a List of Contract Vendors

ProcureAZ version 10.0 includes added functionality to use the Master Blanket PO as a list of approved vendor distributors who may then be solicited for their price for contract goods or services. Creation of a Bid-enabled Master Blanket requires the Basic Purchaser role. Once the Master Blanket has been Bid-enabled, the Department Access user may create release requisitions against the blanket and select vendor distributors to be invited to bid. Once approved, the requisition auto-generates a Bid Document that must be managed by a Basic Purchaser user from that point forward through the solicitation and award process, to the creation, approval, and the final sending of the Purchase order.

This functionality is appropriate to use with Master Blanket Purchase Orders that have two or more vendor distributors, to obtain the best pricing from the distributors.

Configure an existing Master Blanket for Solicitations

Be sure you are in the Basic Purchasing role.

Locate the desired Master Blanket. Create a change order, and at the General Tab mark the check box next to Solicitation Enabled. Save & Continue. This is what drives the ability to create solicitations from the blanket.

Change Order (In Progress) - Master Blanket Purchase Order PO-11-AGENCY-01064 Status: 3PS - Sent

General Items Subcontractors Control Attachments(3) Summary [Back to PO](#)

PO Number:	PO-11-AGENCY-01064	Release:	0
Short Description*:	Standby Generators	Status:	3PS - Sent
Purchaser:	DiMuro, Gerard	Receipt Method:	Quantity
Fiscal Year:	2011	PO Type:	Blanket
Department*:	PURCH - Purchasing Department	Organization:	Managed Shared Organization
Location*:	PRCH - Purchasing		
Solicitation Enabled:	<input type="checkbox"/>	Print Format: *	PO Change Order
Type Code:		Release Type	Standard Release
Catalog:		Alternate ID:	132514
Entered Date:	10/13/2011 04:03:15 PM	Days ARO:	0
Print Dest Detail:	If Different	Discount %:	0.0
Control Code:		Contact Instructions:	
Retainage %:	0.0	Tax Rate:	
Work Order Number :		Actual Cost:	\$303,924.00
Date Last Updated:	05/14/2012 11:09:42 AM	User last Updated:	Support User

[Save & Continue](#)

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The Master Blanket will now be Solicitation Enabled. All release requisitions against this blanket will now require a closed solicitation process among vendors selected from the distributors list, selected by the department access user before processing the requisition.

If at some later date the agency desires NOT to have the master blanket be solicitation enabled, another change order must be processed to uncheck the Solicitation Enabled checkbox, and release requisitions will return to the customary release against a blanket with open selection of vendor distributors.

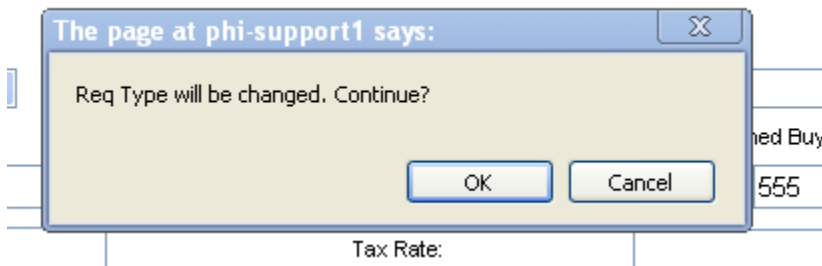
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To begin a solicitation from the Master Blanket:

As a **Department Access** user, begin a new requisition: (Documents : Requisitions: New)

The General tab

Complete all the required fields and specify that the Requisition type is Release. Acknowledge the requisition type will be changed.



Once the tab updates, a new field will appear called Solicitation Enabled. Click to enable the solicitation.

Release Requisition RQ12NYSARC04872 Status: 1RI - In Progress

General | Items | Vendors | Distributors | Address | Accounting | Routing | Attachments | Notes | Reminders | Summary

Requisition Number: **RQ12NYSARC04872** Short Description*:

Status: 1RI - In Progress Fiscal Year:

Department*: Organization: AHRC Nassau

Location*: Solicitation Enabled: ☒

Required By Date: Entered Date: 05/15/2012

Requisition Type: Type Code:

Requestor: Administrator System Purchaser: To Be Assigned Buyer

Contact: Administrator System Contact Phone: -

Alternate ID: Tax Rate:

Estimated Cost: \$7,998.00

Print Format: *

Work Order Number:

Date Last Updated: 05/15/2012 08:37:56 AM User Last Updated: Administrator System

Save & Continue

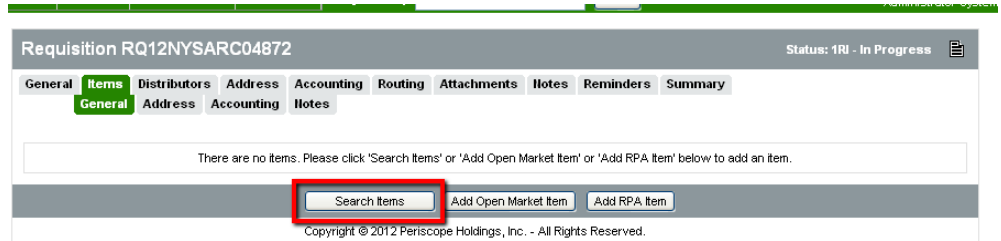
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(If you do not click this, the requisition will behave as a standard release to the primary vendor on the contract) Save and Continue.

Creating a Bid from a List of Contract Vendors

The Items Tab

Choose Search Items



The screenshot shows the 'Items' tab for Requisition RQ12NYSARC04872. The status is '1RI - In Progress'. The 'Items' tab is selected, showing a message: 'There are no items. Please click 'Search Items' or 'Add Open Market Item' or 'Add RPA Item' below to add an item.' The 'Search Items' button is highlighted with a red box. Below the buttons is the copyright notice: 'Copyright © 2012 Periscope Holdings, Inc. - All Rights Reserved.'

Creating a Bid from a List of Contract Vendors

Search for the PO number or primary vendor of the Master Blanket and click Find It

Advanced Search

Search Using:	ALL of the criteria ▼	
Search Fields:	Contract PO #	3027
	Description	
	Item Description	
	Vendor Name	
	Catalog	▼
	Item Type	▼
	HIGP Class	▼
HIGP Class Item	▼	
Cooperative Purchasing	<input type="checkbox"/>	
Result Type:	Item ▼	<input type="checkbox"/> Show Orderable Only
<div>Find It</div> <div>Clear</div>		

Add the desired items, then click Add to Req & Exit.

Release Results

Release											
Search By: << first < prev 1 next > last >>											
Any Price	Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Vendor Name	Class Class Item	Discount %	Master Blanket #	Direct Release Allowed
<ul style="list-style-type: none"> Up to \$2,500 (2) \$2,500 - \$5,000 (1) 	<input checked="" type="checkbox"/>	2	0	Deposit: \$1,000 per generator	\$1000.00	EA - Each	Blackhawk Electric Supply	285 - ELECTRICAL EQUIPMENT AND SUPPLIES (EXCEPT CABLE AND WIRE) 39 - Generators, Stationary Type (Not Automotive)	0.00%	PO-12- AGENCY- 03027 / 3	No
<ul style="list-style-type: none"> Blackhawk Electric Supply (3) 	<input type="checkbox"/>	2	0	Millbank Briggs & Stratton MG 20002 20kw Millbank Generator 120/140 sinle phase, Mg2003992 200 amp service entrance rated...	\$2999.00	EA - Each	Blackhawk Electric Supply	285 - ELECTRICAL EQUIPMENT AND SUPPLIES (EXCEPT CABLE AND WIRE) 39 - Generators, Stationary Type (Not Automotive)	0.00%	PO-12- AGENCY- 03027 / 1	No
	<input type="checkbox"/>	0	0	Payment Terms: 25% Deposit (\$75,981) and check due on delivery for actual amount delivered.	\$0.00		Blackhawk Electric Supply	-	0.00%	PO-12- AGENCY- 03027 / 2	No

<< first < prev 1 next > last >>

Add to Req & Exit

Cancel & Exit

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The Vendors Tab

No action is necessary at this tab

The Distributors Tab

Select which Vendors are to be invited to participate in this solicitation. By default all distributors are selected. You may deselect all by checking and unchecking the select box, or deselect individual vendors by unchecking the box next to their name.

Release Requisition RQ12NYSARC04872
Status: 1RI - In Progress

General
Items
Vendors
Distributors
Address
Accounting
Routing
Attachments
Notes
Reminders
Summary

Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Select
00000008		Rudox Engine & Equipment Co.	Email	<input checked="" type="checkbox"/>
00000054		Performance Electrical Services	Email	<input checked="" type="checkbox"/>
00000449		Blackhawk Electric Supply	Email	<input checked="" type="checkbox"/>
00000524		RP SCHMIDT & SON LLC	Email	<input checked="" type="checkbox"/>

Save & Continue
Reset

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The remaining tabs are completed in the same manner as for any other type of requisition.

Go to the Summary tab and submit the Requisition for approval.

Once the Requisition is approved, it becomes an Open Market Bid in the In Progress status. This is a closed bid, limited to the distributors selected on the Requisition.

From this point forward, all actions must be taken by a user with the **Basic Purchaser** role.

Conducting the Solicitation

A user with the role of **Basic Purchaser** must open the bid document and input the bid opening date and bid available date. All the other fields normally editable by a Basic Purchasing user may be edited at this point as well, with the exception that the only vendors that may be added to the Bidders list are the distributors on the Master Blanket.

The Basic Purchasing user completes the required fields and submits the Bid for approval, then sends the bid, and conducts the solicitation, revision, bid tabulation and evaluation process like any other solicitation.

Creating a Bid from a List of Contract Vendors

Following approval of the bid award, the awarded bid may be converted to a Release PO or POs to the selected vendor(s) with the amount of the PO recorded on the Master Blanket.

Open Market Bid 00001446 - Purchase Order(s) Created Status: 2BPO - Bid to PO

The following Purchase Order(s) were created:

PO #	Vendor ID	Vendor Name	Total	Date Created	Status
PO-12-AGENCY-03027: 2	00000524	RP SCHMIDT & SON LLC	\$4,500.00	05/15/2012	3PI - In Progress

OK

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Sending the PO and Notifying the Vendor

The resulting Release PO is at the status of In-Progress. A Basic Purchasing user must edit the PO as necessary before submitting for approval, sending the purchase order, and notifying the vendor.

Updates to the Master Blanket

Once the Release PO goes to '3PS-Sent' status, the control tab of the Master Blanket will be updated to reflect the amount of the PO.

Master Blanket Purchase Order PO-12-AGENCY-03027 Status: 3PS - Sent

General Items Vendor Routing **Control** Attachments(3) Notes Change Orders Reminders Summary

Master Blanket/Contract Begin Date: 05/01/2012 Master Blanket/Contract End Date: 05/01/2013

Cooperative Purchasing Allowed ☒

Organization	Department	Dollar Limit	Dollars Spent to Date	Minimum Order Amount
ALL ORG - Organization Umbrella Master Control	AGY - Agency Umbrella Master Control	\$0.00	\$4,500.00	\$0.00

i Dollar Limit set to 0 indicates no limit.

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